

Insurance deduction notice for personal superannuation contributions

Macquarie Investment Management Limited ABN 66 002 867 003 and Macquarie Superannuation Plan ABN 65 508 799 106



IMPORTANT: Use this notice if you intend to claim tax deduction for personal contributions made to the insurance-only division of the Macquarie Superannuation Plan or want to vary a previous notice you have already submitted.

There are some important restrictions that can affect the validity of your deduction notice. Please consult your adviser or a taxation professional for further information.

1 Client details

Account number (if known)

Given name(s)

Surname

Tax File Number (if not already provided)

2 Financial year to which this notice relates

Year ended 30 June

3 Please read this before answering the question

If you have made **multiple contributions** in the year, this notice does not have to cover every contribution. Only include those contributions to which this notice will apply. If this notice covers multiple contributions, do not include any contribution covered by a previous notice this year.

Amount of contributions made in the financial year

\$

Amount you intend to claim as a tax deduction

\$

4 Please read this before answering the question

If you are varying an earlier notice, the amount you intend to claim as a tax deduction **cannot** be greater than the amount stated in the earlier notice.

Is this notice varying an earlier notice?

No

Yes

5 Declaration

If you have not previously lodged a notice with the fund for these contributions:

I confirm:

- I am lodging this notice before both of the following dates:
- the day that I will lodge my income tax return for the financial year stated in question 2, and
- the end of the financial year after the year stated in question 2.

At the time of completing this notice:

- I am a member of the insurance-only division of the Macquarie Superannuation Plan,
- I intend to claim the personal contributions stated in question 3 as a tax deduction,
- I have not included these contributions in an earlier notice.

I understand that if I choose to vary this notice, I cannot increase the amount I intend to claim as a tax deduction.

The information given on this form is true and complete.

OR

If you have already lodged a notice with the fund for these contributions and wish to reduce the amount stated in that notice.

I confirm:

- I intend to claim the personal contributions stated in question 3 as a tax deduction.
- I wish to vary my previous notice for these contributions by reducing the amount I advised in my previous notice. I confirm that either:
 - I have not yet lodged my income tax return for the year stated in question 2 and this variation notice is being lodged on or before 30 June in the financial year following the year stated in question 2, OR
 - the Tax office has disallowed my claim for a deduction for the relevant year stated in question 2 and this notice reduces the amount stated in my previous notice by the amount that has been disallowed.
- The information given on this form is true and complete.

Name of life insured:

 / /

Signature:

Send this form to:

Macquarie Investment Management Limited

GPO Box 5216 Brisbane QLD 4001 (reply paid envelope enclosed) Fax: 1800 812 175

Email: insurance@macquarie.com

If you have any questions about completing this form please call us on 1800 005 057